



180 South Clinton Avenue, Suite 300  
Rochester, NY 14604-1933  
(p) 585.935.5300  
(f) 585.777.4037  
(e) info@HighFallsAdvisors.com  
HighFallsAdvisors.com

January 2018

Dear Tax Client:

We hope that this letter finds you and your family well. Our big news this year, apart from new tax legislation, is that we have moved! We are excited about our new suite and we hope that you have the opportunity to stop and see it, even if you're just dropping off your return.

Our tax team is currently preparing for the 2017 tax filing season and we will begin taking appointments and preparing taxes on **Monday, January 29, 2018**. Please note that this is the first day the IRS will begin accepting e-filed returns. Our regular office hours are Monday through Friday 8:30 a.m. to 4:30 p.m., but we are able to accommodate evenings and Saturdays upon request. You may drop off your tax documents, mail them to our office, or schedule an appointment. If you intend to drop off or pick up your tax documents AFTER our regular office hours, **please make sure we will be in the office**. The best number to reach us after hours is (585) 935-8523.

Enclosed you will find our *Engagement Letter, Consent to Use Form (optional), Client Intake Data Sheet, Hours and Parking Directions, Map and Directions Card, and 2017 Tax Year Checklist*. **Please complete and include the yellow sheets when you come for your appointment or drop off your tax documents.** Since this may be the first time you've visited our new space, please also take a minute to review the *Hours and Parking Directions Sheet*. It contains important information about parking and how to access our building from the garage.

Remember that NYS now requires information from your Driver license or Non-Driver ID. We are asking that you provide a copy (front and back) of your Driver License or Non-Driver ID with your tax packet or you can ask our receptionist to make a copy when you drop off your documents.

The tax filing deadline this year is **Tuesday, April 17, 2018**. In order to meet this deadline, our office must receive all tax documents or have your appointment on the schedule no later than **Monday, April 2, 2018**. If received after this date, we may have to file your taxes on extension.

As you gather your documentation this year, remember that many of your tax forms are available online and may no longer be mailed out in paper format. We will do our best to remind you of forms that may be missing, if we had them in a prior year. The most common omissions we have seen are: NYS unemployment forms (1099-G), student loan interest forms (1098-E), investment income forms, particularly if you don't receive paper statements, and college tuition statements (1098-T).

Please visit our website at [www.highfallsadvisors.com](http://www.highfallsadvisors.com) to access additional tax resources and worksheets to help you as you prepare your tax data. From the homepage, select the "Tax Tools" tab under "Client Resources." Also, if you would like a personalized tax organizer e-mailed or mailed to you, please e-mail us at [tax@highfallsadvisors.com](mailto:tax@highfallsadvisors.com) or call Bob Vay at 585-935-8507.

Thank you so much for your continued business and referrals. We look forward to working with you.

Sincerely,

*High Falls Advisors, Inc. Tax Team*